Alberta Tourism Market Monitor

Calgary International Airport enjoyed modest growth in March 2016...

Calgary International Airport seems to be holding its own, despite the economic downturn in the province. Air traffic volumes continued to grow in March 2016, the third consecutive month of growth in 2016. It welcomed about 1.3 million passengers in total in March 2016, a 2.9% increase compared to the same month last year. This modest growth was mainly driven by strong domestic air traffic volumes, which grew by 6.3% compared to last March. International air traffic edged up slightly (1.4%) during the same period, following strong growth in January (10.3%) and February (11.5%).

For more information please contact Emily Wang at tourism.research@gov.ab.ca or 780-427-6206

Air passenger traffic from the US to Calgary International Airport has been dropping since the beginning of 2016: air traffic volume shrank by 6.3% in March, following decreases in both January (-7.2%) and February (-6.5%). This is most likely due to reduced business travel.

... but Edmonton International Airport had a slow month in April 2016

Edmonton International Airport continues to feel the pinch of the economic downturn. In April 2016, Edmonton recorded 534,500 enplane-and deplanements, representing a decrease of more than 58,000 (or -9.8%) from April 2015. Slower transborder traffic between the U.S. and Alberta contributed to 58% of the total drop in April 2016. After experiencing consecutive positive traffic gains for 10 months from June 2015 to March 2016, domestic air traffic volume contracted by 3.4% in April 2016. International air passenger traffic also slowed down significantly in April, with a decrease of 17.8% compared to April 2015.

Air traffic volume is expected to pick up gradually in the summer months.

2015/16 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2016 (000's of arrivals and departures) [1]													
Edmonton International Total	602.7r	**554.2r**	**578.3r**	**534.5p**									**2229.4p**
Per cent change from 2015	-6.8%	**-1.3%**	**-5.8%**	**-9.8%**									**-5.1%**
Domestic	400p	397.9p	426.7p	**399.5p**									**1624.2p**
Per cent change from 2015	0.5%	4.5%	1.3%	**-3.4%**									**0.6%**
Transborder	97p	95.2p	95.5p	**85.7p**									**373.3p**
Per cent change from 2015	-18.0%	-20.5%	-26.1%	**-28.2%**									**-23.2%**
International	65.4p	61.1p	56.1p	**49.3p**									**231.9p**
Per cent change from 2015	-0.5%	0.2%	-11.2%	**-17.8%**									**-7.2%**
Calgary International Total	1205.9r	1193.5p	**1304.2p**										**3703.5p**
Per cent change from 2015	0.5%	3.8%	**2.9%**										**2.4%**
Domestic	810.9r	810.7p	**892.5p**										**2514.1p**
Per cent change from 2015	1.2%	5.9%	**6.3%**										**4.5%**
Transborder	236.3p	237p	**263.2p**										**736.5p**
Per cent change from 2015	-7.2%	-6.5%	**-6.3%**										**-6.6%**
International	158.6p	145.8p	**148.6p**										**452.9p**
Per cent change from 2015	10.3%	11.5%	**1.4%**										**7.6%**
Fort McMurray International Total	67.9p	71.0p	**76.4p**										**215.4p**
Per cent change from 2015	-30.3%	-21.9%	**-21.5%**										**-24.6%**
Highway Count 2016 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.1	57.5	71										185.6
Per cent change from 2015	-1.0%	0.4%	9.7%										3.3%
Hwy 1 - Banff Pk Gate (2-way)	542.1	550.8	626.1										1719
Per cent change from 2015	8.0%	9.0%	15.0%										10.8%
Hwy 16 - Jasper Pk Gate (2 way)	90.1	89	118.8										297.9
Per cent change from 2015	-6.4%	-4.1%	6.4%										-1.0%
Hwy 16 - Blackfoot w-bound	143.9	139.2	160.3										443.4
Per cent change from 2015	-12.3%	-5.0%	-6.2%										-7.9%
National Park Attendance (000's of visitors) 2016 [3] Does not include Group Tours													
Banff	196.6p	**212.2p**	**239.1p**										**647.9p**
Per cent change from 2015	6.3%	**12.5%**	**17.3%**										**12.2%**
Jasper	51.0p	**55.2p**	**71.6p**										**177.8p**
Per cent change from 2015	-3.4%	**3.0%**	**11.7%**										**4.3%**
Waterton Lakes	8.5p	11.5p	13.1p	**19.6p**									**52.7p**
Per cent change from 2015	26.9%	53.3%	40.9%	**32.4%**									**37.6%**
Employment (000's of persons) 2016 Seasonally Adjusted [4]													
Accommodation and Food Services	138p	135.7p	**138.6p**	**141.0p**									**138.3p**
Per cent change from 2015	-12.0%	-13.7%	**-11.1%**	**-8.1%**									**-11.4%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada, Statistics Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices 2016 [5]													
Edmonton Occupancy Rate	49.7%	59.0%	61.0%										54.4%
Point change from 2015	-5.0	-6.7	-6.2										-5.9
Average Daily Room Rate	$128.02	$131.88	$131.91										$129.95
Variance from 2015	-5.0%	-4.3%	-5.0%										-4.7%
Revenue per available room	$63.58	$77.83	$80.46										$70.71
Calgary Occupancy Rate	45.8%	50.9%	53.5%										48.4%
Point change from 2015	-9.4	-11.1	-10.2										-10.3
Average Daily Room Rate	$138.84	$138.98	$137.57										$138.91
Variance from 2015	-10.4%	-10.7%	-12.1%										-10.6%
Revenue per available room	$63.63	$70.69	$73.65										$67.16
Alberta Resorts Occupancy Rate	42.5%	53.9%	55.4%										48.2%
Point change from 2015	1.6	0.5	5.6										1.1
Average Daily Room Rate	$184.26	$195.28	$195.40										$189.77
Variance from 2015	0.9%	10.7%	14.3%										5.8%
Revenue per available room	$78.40	$105.22	$108.31										$91.81
Other Alberta* Occupancy Rate	35.3%	39.6%	40.4%										37.5%
Point change from 2015	-17.1	-15.9	-12.7										-16.5
Average Daily Room Rate	$122.20	$123.10	$120.47										$122.65
Variance from 2015	-9.0%	-7.8%	-8.3%										-8.4%
Revenue per available room	$43.09	$48.69	$48.70										$45.89
Total Alberta (excl. Resorts) Occupancy Rate	42.4%	48.3%	49.9%										45.4%
Point change from 2015	-11.5	-12.1	-10.4										-11.8
Average Daily Room Rate	$129.50	$131.06	$129.79										$130.28
Variance from 2015	-8.0%	-7.5%	-8.5%										-7.8%
Revenue per available room	$54.94	$63.24	$64.82										$59.09
Food Services and Drinking Places 2016 ($ Millions) unadjusted [6]													
Total Receipts for Alberta	$667.86p	660.34p											664.10p
Per cent change from 2015	-3.1%	0.3%											-1.2%
Historic Sites and Museums 2016 (000's of visitors) [7]													
Visitor Attendance	10.6p	26.4p	36.3p										73.3p
Per cent change from 2015	-6.2%	14.3%	4.0%										5.8%
Exchange Rates 2016 [8]													
Canadian Dollar/U.S. Dollar (noon)	0.70	0.72	0.76	0.78									0.74
Canadian Dollar/ Euro	0.65	0.65	0.68	0.69									0.67
Canadian Dollar/ Great British Pounds	0.49	0.51	0.53	0.54									0.52
Oil Price: Western Texas Intermediate (WTI) 2016 [9]													
Cushing, OK Spot Price (US Dollar per Barrel)	31.68	30.32	37.55	40.75									35.08
Hotel Projects Valued $5 million or Greater 2016 ($ Millions) [10]													
Total Value of Hotel Projects Inventory	$899	$1,102	$1,177										$1,177
Sources: CBRE Limited, Statistics Canada, Alberta Culture, Bank of Canada, WTI, Government of Alberta													

*Other Alberta includes Lethbridge, Red Deer, and other Alberta communities

**Please note that the Royal Alberta Museum closed on December 6, 2015. See Notes section for details.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport have been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport Websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data are included in the annual edition of the Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Tyrrell Museum of Paleontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015. Tyrrell Field Station was closed on weekends and holidays starting October 17th.

8. Exchange Rate- this is the average monthly exchange rate.
Source: Bank of Canada.

9. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

10. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

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